South Carolina Department of Health and Environmental Control
Ryan White and HOPWA Programs
http://www.scdhec.gov/rwhopwata

Data Management Bulletin

January 2009

Technical Assistance

❖ **Ryan White and HOPWA Technical Assistance (TA) website**
(http://www.scdhec.gov/rwhopwata) – There are numerous TA and training materials posted on our website. Additional resources will continue to be posted on the website as they are developed. (See list at the end of this PE Bulletin for tools currently and soon to be available). * Please bookmark this website so you can easily refer to it throughout the year!

❖ **GTI Help Desk** – The GTI Help Desk is available through Lotus Notes e-mail and should be used as the first point of contact for all technical questions/issues related to the functionality of Provide Enterprise. * Please note: All requests to add or change: Services Provided, Care Actions, Applications, Progress Log/Medical Encounter Contacts should be sent to the RW HOPWA TA Help Desk (details below).

❖ **Hands-on Training** – As part of the TA contract with SC DHEC, Catawba Care Coalition will host regularly scheduled classroom training. After curricula are established by SC DHEC, Catawba Care will prepare to host these trainings on an ongoing basis. When a schedule for training becomes available, notification and process for registration will be provided in future monthly PE Bulletins and posted on the RWHOPWA TA Website. Additional questions/feedback relating to this training should be sent to the RW HOPWA TA Help Desk.

❖ **Ryan White and HOPWA TA Help Desk (Lotus Notes)** - Effective immediately, SC DHEC now hosts a RW HOPWA TA (TA) Help Desk in Lotus Notes. This Help Desk in-box allows SC DHEC to centralize all requests from service providers for information around PE, reporting, data collection, data input and quality management.

The RW HOPWA TA Help Desk will generally oversee that issues reported to GTI are resolved, facilitate communication of resulting solutions to users statewide, navigate users to support materials, and address service provider needs for issues relating to: 1) data entry requirements, 2) requests that require SC DHEC approval, and 3) additional PE enhancements. (See table below for descriptions of issues to submit to the RW HOPWA TA Help Desk.)

To send an e-mail to the RW HOPWA TA Help Desk, simply type in "Help" and the "comma" key in the "To:" line of an e-mail in Lotus Notes. Two options will pop up – choose the "RWHOPWA TA Help" option to send a message to SC DHEC.

We are very enthused about this TA tool and format. Documentation created through the RW HOPWA TA Help Desk process will allow SC DHEC to concretely demonstrate responsiveness to our stakeholders, holding all players in TA to a quality level of customer service.

Help Desk Special Notes:

CONFIDENTIALITY: Although the Help Desk is hosted in a secure Lotus Notes e-mail system, e-mails containing Protected Health Information(PHI) will not be accepted and returned to the user reporting the issue. The reporting user will be informed that issues requiring PHI should be sent directly to Groupware Technologies, Inc. (GTI) for their attention.

Table 1: RW HOPWA TA Help Desk Support Details

Support	Description	Help Desk Ticket Required?	Funder/Grantor	RW Part
Provide Enterprise	Issues with system functionality including record sharing, data entry and retrieval	Yes, contact GTI Help Desk First.	Ryan White, HOPWA, Other	A, B,C,D
Provide Enterprise	Adding or changing Services Provided, Care Actions/Applications, other Encounter documentation procedures	No, report directly to RW HOPWA TA Help Desk	Ryan White, HOPWA, Other	A, B,C,D
CAREWare relating to SC QM	HRSA Database to Collect Care and Treatment Data	Yes, contact CAREWare Help Desk first.	Ryan White	C, D
SC Quality Management	Data elements selected for SC QM to be analyzed and reported to funding bodies, timeline/process for reporting, etc.	No ticket required.	Ryan White	B, C, D
Reporting	Explanation of reporting requirements and rationale associated with data elements	Yes, contact GTI Help Desk First.	Ryan White, HOPWA, Other	B, C, D
SC DHEC (Statewide or Regional RW or HOPWA related data requests)	Request for aggregate data for purposes such as grants, epi data, etc.	No ticket required.	Ryan White, HOPWA	B, C, D

Meeting Schedules and Special-purpose Sessions:

❖ **PE Conference Calls** – SC DHEC will host two conference calls in January to address issues around upcoming reporting (deadlines, TA, etc.) and to disseminate information about the ongoing PE Retrofit projects. Representation is required for at least one of the two calls. We are offering two calls around the same material to allow people to choose which date and time best fits their schedules. The calls will take place on the following dates:

Friday, January 23 from 2:00 – 3:30 PM and Thursday, January 29 from 2:00 – 3:30 PM. In order to call in, please use the following telephone number and passcode(s): 803-896-9993

Passcode for January 23: 003706   Passcode for January 29: 430152

❖ **Case Management Workgroup Meeting** – January 22, 2009 at 2 Medical Park Room B;

❖ **Peer Review Meeting** – March 5, 2009 at DHEC Mills-Jarrett Building Room N-355

Be sure to report questions/issues to your agency representative.

SC Provide Enterprise

Enhancements and Features:

❖ **Action Plans** – SC is currently in the testing phase of the Action Plan redesign and templates are being developed for statewide use, similar to Problem Log sample text in former Service Plan.

Catawba Care Coalition is managing the Action Plan sample documents and other aspects of roll-out, under the TA contract with SC DHEC. Upon completion of thorough testing and sample templates, the Action Plans will be available in the test database for vetting by all end users.

Catawba Care Coalition will communicate the process and timeframe for Action Plan vetting/feedback. At the end of the vetting period, feedback will be reviewed and implemented as appropriate. The Action Plans will be available for statewide use and required in PE in order to meet Ryan White Part B Case Management Standards. Estimated timeline for completion of this project is March 2009. A manual for SC Action Plans will be published as part of rollout.

❖ **Care Actions/Applications Stand-alone Entry** – As part of the 4.2 Release, Care Actions/Applications may now be entered as stand-alone items. This feature enables users who do not use Progress Logs to enter and track Care Actions/Applications. To have this feature enabled for your site, please have your agency PE administrator submit a request to the GTI Help Desk.

Data Entry Requirements Update:

❖ **Referral Tracking**:

In previous years, SC DHEC has required appointment tracking for the SC CM Standards in the Appointment form in Provide. However, PE allows us to integrate the appointment tracking tools and other response capabilities in the Referral form. Therefore, SC DHEC is endorsing the Referral form for use. Prior to publication of training materials and full Referral implementation, SC DHEC will discuss and establish options to allow distinction between agency-funded Referrals and Referrals funded by an outside source. Additionally, the "Referral Disposition" will be adapted to better fit the Referral tracking needs of SC providers, e.g. "Kept", "Missed", etc.

Sites that have begun using the Referral form should continue to do so. Details of changes are forthcoming.

Since PE was released mid-year 2008, SC DHEC realizes sites may have Referral tracking data in different locations. Therefore, SC DHEC will adapt the reporting and/or reporting requirements to report from both the Appointment form and the Referral form for the Year-end deadline in 2009. Additional information is forthcoming.

<u>PE Retrofit Projects:</u>

What is Retrofit?   The SC design of PE represents an Enterprise approach to managing data. The Enterprise approach establishes a universal structure of data entry and adapts that structure for individualized models of service and data entry. In 2008, SC began the process to 1) establish on-going data entry structure 2) synchronize historically stored data to the same structure 3) improve SC DHEC's ability to provide TA in 2009.

Retrofit reflects that SC DHEC heard feedback in various forums in 2008, is applying these data adjustments to future and historically stored data, coordinating changes with sites, and submitting the changes in batch to GTI to be applied.

Current Retrofit Projects

❖ **Services Provided Picklist Retrofit** – Site picklists were changed according to the Service Glossaries Provided during Oct 7-8 PE Issues Sessions. Each glossary identified Service Provided picklist items to be changed. Sites were then notified of the date of changes. This portion of Retrofit was completed in Oct-Nov 2008. Questions about services currently defined in site picklists should be sent to the RW HOPWA TA Help Desk.

❖ **Service Provided Historical Retrofit (In progress)** – This Retrofit will allow for continuous reporting of Services Provided, Care Actions, and Applications. Data elements formerly entered as Services Provided, that are now captured elsewhere, will be mapped and formatted to the form in PE where the data is currently entered.

For example, requirements of a service are currently entered in Care Actions. In the past, these items, such as "Initial Assessment", were entered as Services Provided. This Retrofit, will use stored services (now standardized), to create Care Actions dating back as far as 1997. Upon project completion, reports will be able to look in a single location for Care Actions, and find not only Care Actions created since PE migration but also Care Actions initially created as Services, as far back as 1997.

Each site will receive a list of changes with a period for feedback prior to implementation. These changes will be consistent with your current draft Service Provided Glossaries sent to each site Oct 7-8, 2008.

❖ **Care Actions/Applications Retrofit** – RW staff are working to re-name and provide a glossary of Care Actions/Applications for statewide use. This enhancement will simplify the naming of these items and display the associated Category.

❖ **PE Retrofit – Referral Mapping (In progress)** -- RW staff have been working to complete reporting capabilities for referrals. During standardization of the service lists, referrals were mapped to services (usually a case management service). As assured, this gave credit for providing connection/coordination of service. This second phase will allow for reporting the number of referrals. The end result will reflect current and historical data that allows reporting of both the service and the referral. Feedback on Referral Retrofit spreadsheets sent to sites is due to SC DHEC on Jan 16, 2009.

Other Retrofit Projects:
Progress Log Contact Types entered as Case Management that were intended as Medical Case Management; Vaccination and Treatment History Retrofit

<u>Reporting</u>

- ❖ **Ryan White HIV/AIDS Program Data Report (RDR)** – Due to SC DHEC on February 16, 2009. * For sub-contracted agencies, RDR's may be required earlier than February 16, 2009. While there is still work to be done behind the scenes in Retrofit before this report is fully functional to accurately capture data, SCDHEC expects the report to be fully working by February 12, 2009.

- ❖ **Ryan White HIV/AIDS Program Services Report (RSR)** – Due to the Health Resources and Services Administration (HRSA) in September 2009, in client-level format. SC DHEC and GTI are currently working on a few modifications to PE to ensure that data is captured appropriately to meet the reporting requirements. Also, GTI has been working directly with HRSA to produce the data in the required submission format. PE 4.2 is one of a handful of systems HRSA has certified in the Readiness Assessment.

- ❖ **HOPWA Annual Progress Report (APR)** – Agencies should continue entering HOPWA-funded encounter data. Specific issues should be reported to GTI. Enterprise solutions for APR issues will be addressed after the RDR submission.

<u>SC Quality Management (QM)</u>

- ❖ The first data collection period for QM data begins January 1, 2009 and goes through June 30, 2009. Data for this period will be submitted to DHEC in July 2009 as a pilot with final data to be due in September 2009 (keeping aligned with HRSA's CLD due date). A secure data submission process will be in place by July in order for all Ryan White providers in South Carolina to be able to submit data securely.
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- ❖ Technical Assistance tools released will assist sites with data entry and reporting tools to meet the QM submission deadlines and quality goals. To minimize the data entry burden on Service Providers, QM data variables are being closely matched with HRSA's RSR data entry requirements. (See List below for TA Tools Schedule)

<u>Technical Assistance/Training Materials:</u>

Currently available on SC DHEC website: http://www.scdhec.gov/RWHOPWATA.

- - **CM Progress Log Documentation** – Updated for PE Oct 2008.
- - **SC Intake and Intake Instructions** –This form with Instructions lists fields currently required to be entered in PE and describes the data entry procedures for Intake data. (Will be revised in 2009, see details below.)
- - **Ryan White Program Data Report 2008 (RDR)**
- - **Ryan White Program Service Reporting 2009 (RSR)/Client Level Data (CLD)**
- - **PE Instructions to Run and Save RDR.**
- - **PE Instructions to Document a Client as Deceased.**

To be published before February 16, 2009

- - **PE Data Entry Requirements**: List of all forms, including scenarios, required for documentation in PE.
- - **SC Revised Intake and Intake Instructions** : Instructions for RSR(CLD), HIV Qual, SC ADAP Revised Application, and SC QM data entry. (May be published after Feb 16, 2009)
- - **SC Service Provided Glossaries (Site-specific):** List and definitions for only Services Provided actively enabled for each agency.
- - **SC Service Provided Glossary (Statewide):** List and definitions of EVERY service used by or available to agencies using PE in SC.
- - **Care Actions/Applications Glossary (Statewide)**: List and definitions for Care Actions/Applications.

Future Projects/Technical Assistance Tools

- PE Required Actions and Triggers Standardization – This project and respective training tools will establish notifications and reminders tools for ALL SC Providers depending on service model and will be based on PHS/NIH Guidelines, SC Quality Management, SC ADAP, and SC Case Management Standards.

  Transfer Tools – This tool will establish standard routines in PE for sharing and transferring client records, including a process to facilitate record releases to avoid documentation delays.